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Gateway User Guide

Form 4A BUDGET REPORT

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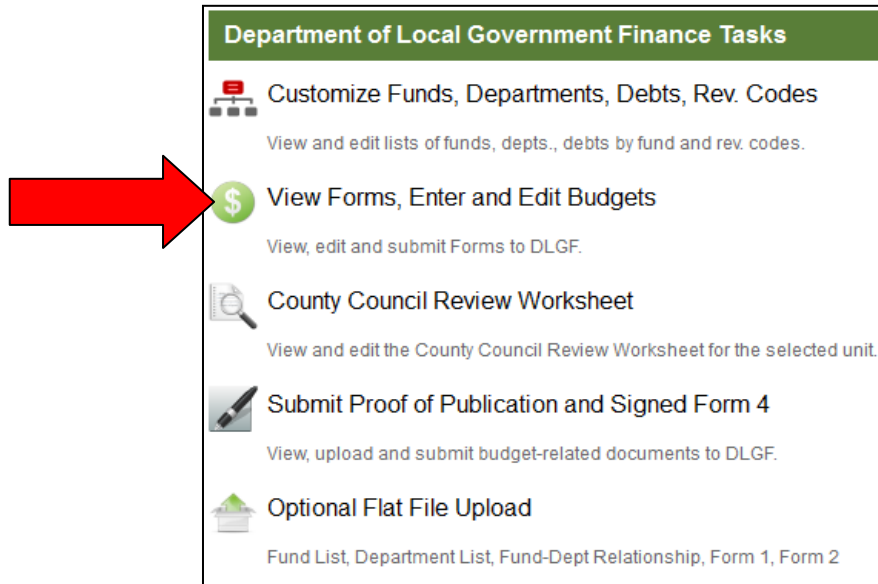
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Getting Ready

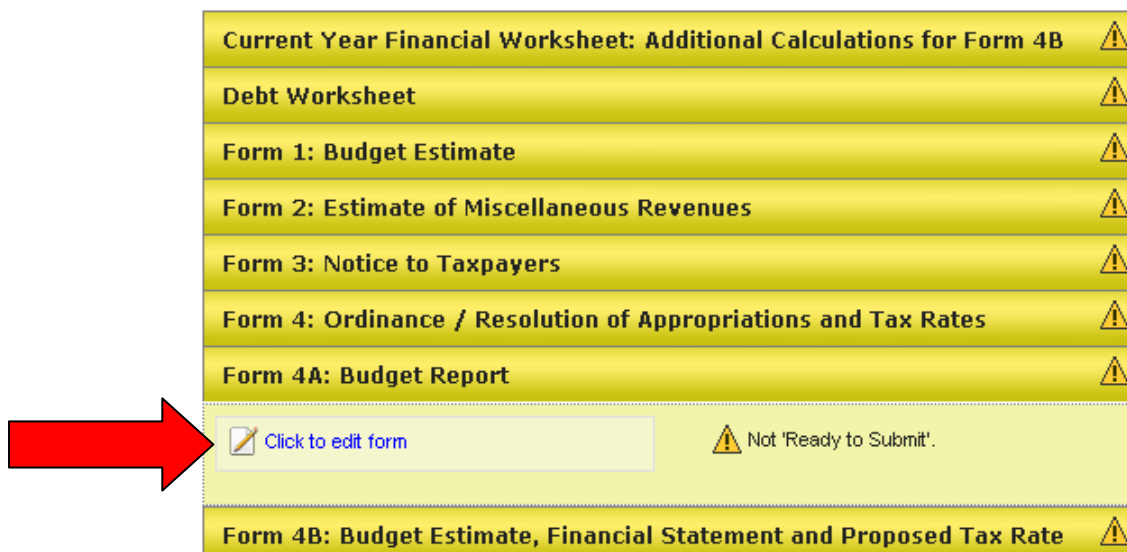
Form 4A presents the unit's budget subtotaled by fund, department, and major classification (Personal Services, Supplies, Other Services and Charges, Capital Outlays, Debt Service, and Township Assistance).

Accessing the Form 4A

First, navigate to the Budget Form Menu by selecting the unit and then click "View Forms, Enter and Edit Budgets."



From the Budget Form Menu, click on the link on the left side of the Form 4A box that says, "Click to edit form." This will load the form.



Ensuring Proper Options are Available on the Form

Form 4A is divided using drop-down menus. The first drop-down menu allows users to select a fund. Once a fund is selected, Gateway will populate a second drop-down menu from which to select the department.



Select Fund:
0101 - GENERAL

Select Department:
0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)

A large red arrow points to the 'Select Department' dropdown menu.

To ensure that the proper options are available in these drop-downs, all three steps on the left-hand side of the Customize Unit area must be complete. For assistance, please view the *Customize Units user Guide*.

Customize Funds and Department Lists



Customize Funds List



Customize Departments List



Customize Departments by Fund List

View and cross-index departments by selected fund.



Customize Revenue Codes List

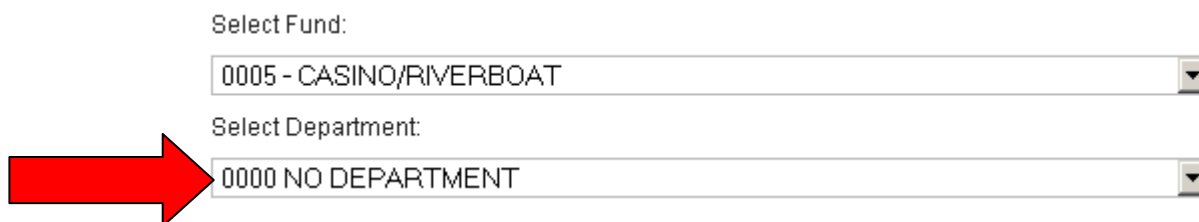
Select revenue codes for use within this unit's Form 2.



Customize Debts by Fund List

View and cross-index debts by selected fund.

If Form 4A looks like the image below for a particular fund, that means that the fund-department link has *not* been specified in the Customize Unit area. If a unit of government is not departmentalized, the department field may be left as "0000 No Department."




Select Fund:
0005 - CASINO/RIVERBOAT

Select Department:
0000 NO DEPARTMENT

A large red arrow points to the '0000 NO DEPARTMENT' option in the 'Select Department' dropdown menu.

Entering Data on the Form 4A


For each subcategory, Form 4A collects two pieces of information: the Published Amount and the Adopted Amount.

DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)					
Published Amount			Adopted Amount		
PERSONAL SERVICES	\$ 100		\$ 200		
SUPPLIES	\$ 300		\$ 400		
OTHER SERVICES AND CHARGES	\$ 0		\$ 0		
CAPITAL OUTLAY	\$ 0		\$ 0		
DEBT SERVICE	\$ 0		\$ 0		
TOTAL	\$ 400		\$ 600		

The **Published Amount** is the amount that is proposed at the beginning of the budget process and published in the newspaper. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution. Form 4A summarizes the amounts entered in Form 1 into category totals.


Completing Form 4A by Pulling Form 1 Values


Form 4A is simply a summary of Form 1. Provided at least the published column of Form 1 has been entered, the Form 1 amounts can be pulled into Form 4A by clicking the button that says “Click to Insert All Unit Amounts From Form 1.” Clicking this automatically pulls the values from all the funds and departments in the Form 1 into the Form 4A in a single click.

Budget Report 

Select Fund:

Select Department:

 [Click to Insert All Unit Amounts From Form 1](#)

DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)					
Published Amount			Adopted Amount		
PERSONAL SERVICES	\$ 100		\$ 200		
SUPPLIES	\$ 300		\$ 400		
OTHER SERVICES AND CHARGES	\$ 0		\$ 0		
CAPITAL OUTLAY	\$ 0		\$ 0		
DEBT SERVICE	\$ 0		\$ 0		



If you happen to change any information on Form 1, it is important to re-pull the information into Form 4A. This will help prevent incorrect amounts being pulled into other forms.



Completing the Form 4A in Stages

Because units propose budget figures at the beginning of budget season and adopt them months later, the Form 1 amounts may be copied while only the published column is completed and later the adopted values may later be pulled into Form 4A. Populating the Form 4A updated information entered in Form 1 will be done with the single click of the “Click to Insert All Unit Amounts From Form 1” button.

Select Fund:

0101 - GENERAL

Select Department:

0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)



Click to Insert All Unit Amounts
From Form 1

DEPARTMENT: 0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)		
	Published Amount	Adopted Amount
PERSONAL SERVICES	\$ 100	\$ 200


Signing the Form Electronically

At the bottom of Form 1, there is a box for the user to place an electronic signature on the form. Only the user with submission rights will see the signature box.


Form Signature

NAME

TITLE

SIGNATURE/PIN
 

DATE

 SIGN AND DATE FORM

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

The signature box will be invisible to users with edit or read-only rights.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the Department at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

Form Signature

NAME

TITLE

SIGNATURE/PIN
 

DATE

Form signature values saved at 02:54 PM and 58 seconds.

 SIGN AND DATE FORM

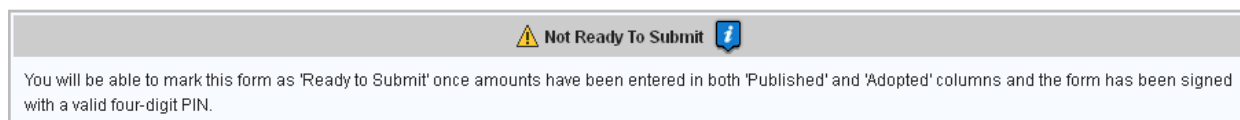


Once you see the red text stating Form Signature Values Saved, you have successfully signed Form 4A.

Marking the Form “Ready to Submit”

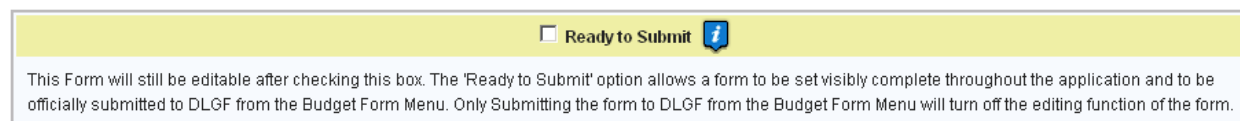
At the bottom of Form 4A and all other forms there are “Ready to Submit” status boxes. Before the form is entirely complete, there will be a grey box that is titled “Not Ready to Submit.”

The budget forms have a feature built in called validation. This does not allow the form to be marked as Ready to Submit, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in previous years. Upon closer review, you will notice that the box states, *“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.”*



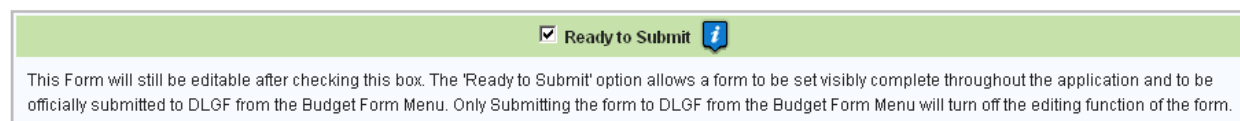
This screenshot shows a grey status box at the bottom of a form. At the top, it says "Not Ready To Submit" with a yellow warning icon and a blue information icon. Below this, the text reads: "You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN."

Once information has been entered in the published and adopted columns, and you have signed the form with your PIN, the yellow Ready to Submit option will appear. This gives users the ability to mark the form as ready to submit by clicking on the check box. You will not want to check this box until all the published and adopted amounts columns are entered for all funds.



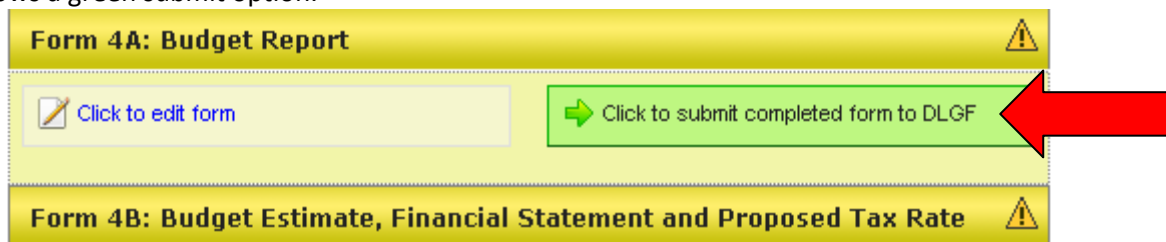
This screenshot shows a yellow status box at the bottom of a form. At the top, it says "Ready to Submit" with an unchecked checkbox, a blue information icon, and a yellow warning icon. Below this, the text reads: "This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form."

Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Form 4A can still be edited until it is submitted.



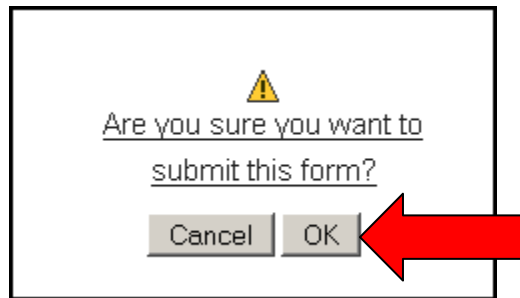
This screenshot shows a green status box at the bottom of a form. At the top, it says "Ready to Submit" with a checked checkbox, a blue information icon, and a yellow warning icon. Below this, the text reads: "This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form."

Note that after Form 4A has been marked as “Ready to Submit”, Form 4A under the Budget Form Menu now shows a green submit option.



This screenshot shows the Budget Form Menu. At the top is a yellow bar for "Form 4A: Budget Report" with a yellow warning icon. Below this is a yellow box containing a pencil icon and the text "Click to edit form". To the right of this is a green box containing a green arrow icon and the text "Click to submit completed form to DLGF". A large red arrow points to this green button. Below the yellow bar is another yellow bar for "Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate" with a yellow warning icon.

If Form 4A is complete and no further changes will need to be made, click on the green “Click to submit completed form to DLGF” button. A pop-up box asking if you are sure you want to submit this form. If you are ready to submit, simply press “OK.”



As noted below, Form 4A on the Budget Form Menu will now appear green and will now only have the option to view in "read only" form.

The screenshot shows a web interface with two main sections. The top section, titled "Form 4A: Budget Report", has a green header and a green body. It contains a button with a magnifying glass icon and the text "Click to view form", and a status indicator showing a green checkmark and the text "This form has been submitted.". The bottom section, titled "Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate", has a yellow header and a yellow body. It contains a yellow warning icon.

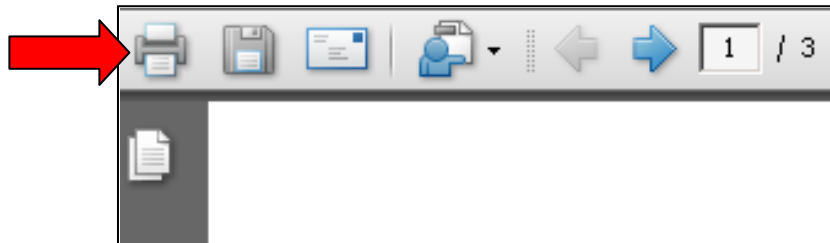
The form may no longer be edited once it has been submitted. If a form has been submitted by mistake, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.

Viewing and Printing the Form

At any point, Form 4A can be printed directly from Gateway. Click the button at the top-left corner of the form that reads, "Click Here for Print/Viewing Options." Next click on the link that reads, "Print/View Form 4A for Currently Selected Fund in PDF Format."

The screenshot shows a web interface with a breadcrumb trail: "Select Unit > Unit Main Menu > Budget Form Menu > Form 4A". Below this is the text "Selected Year: 2013 | Selected Unit: DLGFIBRC County - 9992 Dlgf City 10, DLGFIBRC Co.". A red arrow points to a button labeled "Click Here for Print/View Options". Below this button is a dropdown menu with two options: "Print/View Form 4A for Currently Selected Fund in PDF Format" and "Print/View Form 4A for All Funds for Selected Unit in PDF Format". A second red arrow points to the first option in the dropdown menu. Below the dropdown menu are two dropdown menus for "Select Fund:" and "Select Department:". The "Select Fund:" dropdown is set to "0005 - CASINO/RIVERBOAT" and the "Select Department:" dropdown is set to "0000 NO DEPARTMENT".

Once the page appears in a new window, simply click on the printer icon on the top left hand corner to print. The form may also be saved by selecting the save icon to the right of the print icon. This will save the form as a PDF which can be emailed or posted to a website.



Congratulations! You have successfully submitted Form 4A. Please see our other user guides for assistance with other forms. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.